

Team Check-In Sample

The following pages include a sample and template quarterly check-in forms for you to use in your professional development process.

NAME: Jane Muñoz DATE: 10/7/20

Sample Quarterly Check In



Excelled at:

Jane's work ethic is impressive and she is doing a great job showing initiative. Her commitment is also apparent - we appreciate the extra time she takes to make sure every thing is ready at end of day for a smooth tomorrow.

Room for improvement:

Jane could continue to improve the her attention to detail to make sure little things don't get missed. It is worth it to spend a few extra minutes on a task in order to make sure it's perfect.

Key Successes:

- Completed transition to new CRM system.
- Raving reviews from clients.
- Assisted training a new admin.

Review of Last Quarter Goals:

- Worked with Bob to draft an updated client service model and segment clients in the new CRM system.

Upcoming Goals:

- Studying for the CFP exam (this is an ongoing goal of the next year) in order to move to the Associate Adviser position.
- Complete the prep and practice running at least 5 client meetings this quarter under Bob's direction.



Team Check-In Sample

Sample Quarterly Check In

Opportunities for Professional Development:

- Moving beyond her current position: Jane is ready to step up and initiate the steps necessary to move past her current role. In order to do so, we've set the goals noted below for Jane.
- Slow down. One of Jane's strengths is she accomplishes so many things but sometimes Jane would benefit from slowing down, particularly when talking with clients.

Ideas for Firm Improvement:

- The number of forms and manual entry for paperwork is creating a lot of inefficiency in my role. Would like to evaluate ways to streamline or improve this process.
- I'd like to get the team more training on how to use our new CRM system, training has been "hands-on" but there is formal training that would improve adoption.
- Evaluate the number of new projects we take on and prioritize them, so we have more focus as a team.

Summary:

Jane has consistently exceeded expectations in her role and is performing at the "Jedi-Master" level. She follows through on all client requests in a timely manner, ensures paperwork is consistently accurate and goes out of her way to make clients feel welcome when they come to the meeting. She has spent the last quarter focused on her personal growth and development and is successfully accomplishing these goals, while also taking time out of her day to assist and train a new admin on the team.

Date: _____ Manager/Mentor: _____ Team Member: _____



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Excelled at:

Insert 2-3 examples of values aligning with work

Room for improvement:

Insert 2-3 examples of where work could more closely align with values

Key Successes:

Insert 3-5 specific examples of key successes, contributions or improvements the team member made since the last check-in.

Review of Last Quarter Goals:

What previous goals, projects or priorities did you achieve after last quarter's check in? What is the status update for ongoing goals?

Upcoming Goals:

What upcoming goals, projects or priorities do you want to set for the team member. The number depends on the time between check-ins and the size of the goal but 2-4 is typically a good objective. At least once a year, discuss potential for upward movement in role and what it would take to get there.



Team Check-In Form

Opportunities for Professional Development:

Insert 2-5 areas where the team member can improve performance and/or grow professionally. Consider the following questions as you select areas. Which areas/aspects of their role can they increase or improve their performance? What training or professional development opportunities would they benefit from? Where are the firm expectation's and the team members expectations not aligned? What can be solutions, resources or training can be to make these improvements?

Ideas for Firm Improvement:

Insert agreed upon areas the firm will work to improve upon based upon employee feedback.

Summary:

Overview of employee's strengths and areas for improvement

Date: _____ Manager/Mentor: _____ Team Member: _____

